

SAMPLE BEQUEST LANGUAGE

Planned gifts and bequests may create or add to any of our existing funds at Rose Community Foundation or may be unrestricted so that the Foundation can direct the gifts toward the most critical needs.

Unrestricted Bequest

"I give and bequeath to Rose Community Foundation, tax identification number 84-0920862, located at 600 South Cherry Street, Suite 1200, Denver, Colorado 80246 [specific dollar amount or percentage of the (residuary) estate or description of property] for its unrestricted use and purpose.

New Donor-Advised Fund Bequest

I give and bequeath to Rose Community Foundation, tax identification number 84-0920862, located at 600 South Cherry Street, Suite 1200, Denver, Colorado 80246 [specific dollar amount or percentage of the (residuary) estate or description of property] to establish the _____ Fund [name of donor-advised fund] and I name _____ [individual(s) named by donor to submit grant recommendations to qualified charitable organizations] as the advisor of the Fund.

Existing Donor-Advised Fund Bequest

I give and bequeath to Rose Community Foundation, tax identification number 84-0920862, located at 600 South Cherry Street, Suite 1200, Denver, Colorado 80246 [specific dollar amount or percentage of the (residuary) estate or description of property] to be added to the _____ Fund [name of donor-advised fund], which is an existing donor-advised fund of Rose Community Foundation.

Nonprofit Organization Endowment Fund Bequest

I give and bequeath to Rose Community Foundation, tax identification number 84-0920862, located at 600 South Cherry Street, Suite 1200, Denver, Colorado 80246 [specific dollar amount or percentage of the (residuary) estate or description of property] to establish the _____ Fund [name of fund] as an endowment fund, the income to be used for grantmaking to the following nonprofit organization(s): _____ [or a (specific percentage) of the income and principal] to be used for grantmaking to the following nonprofit organization(s) _____ for a [specific term of years].

Designated Fund Bequest

I give and bequeath to Rose Community Foundation, tax identification number 84-0920862, located at 600 South Cherry Street, Suite 1200, Denver, Colorado 80246 [specific dollar amount

or percentage of the (residuary) estate or description of property] to establish the _____ Fund [name of fund] [as an endowment fund, the income] to be used for the following purpose: _____ [name the purpose, field of interest or nonprofit organization].

The language provided above is not intended to be a substitute for legal or tax advice. Rose Community Foundation urges all prospective donors to seek the assistance of legal and financial advisors. When making a planned gift (such as a bequest, life insurance or retirement plans), please contact Rose Community Foundation so that we can ensure your charitable intentions are fulfilled.